

# CA Agile Vision™

## User Guide Winter 2011



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# Support for Agile Vision

The following types of support are available for Agile Vision customers:

## CA Agile Vision Team Edition Support

For your convenience, CA Technologies provides a self-supported [CA User Community](#) Online Forum where you can access information about Agile Vision, ask questions, and share experiences with other users.

Email or phone support is unavailable. There is no guarantee that issues reported through the community forum will be monitored by CA Support.

If you have comments or questions about documentation, you can submit questions or feedback on the CA User Community Online Forum.

## CA Agile Vision Enterprise Edition Support

For your convenience, CA Technologies provides one site where you can access the information you need for your Home Office, Small Business, and Enterprise products. At <http://ca.com/support>, you can access the following:

- Online and telephone contact information for technical assistance and customer services
- Information about user communities and forums
- Product and documentation downloads
- CA Support policies and guidelines
- Other helpful resources appropriate for your product

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If you have comments or questions about documentation, you can send a message to [techpubs@ca.com](mailto:techpubs@ca.com).

If you would like to provide feedback about documentation, complete our short [customer survey](#), which is also available on the CA Support website, found at <http://ca.com/docs>. Full technical assistance is available for CA Agile Vision Enterprise Edition customers. For more information, contact [CA Customer Support](#).



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# Chapter 1: Overview

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This section contains the following topics:

[About Agile Vision](#) (see page 9)

[About Agile Vision Third-Party Integrations](#) (see page 10)

[Quick Tour](#) (see page 10)

[Get Started](#) (see page 16)

## About Agile Vision

CA Agile Vision (Agile Vision) enables customers to manage products that follow the scrum methodology in an intuitive and simple manner. Agile teams can plan product releases based on date, demand, and capacity. Agile Vision is web-based, so team members can participate in sprint planning, view, and update status from wherever they are located.

Using Agile vision, agile development teams can easily do the following:

- Create and monitor sprints using a timebox approach, and according to demand and capacity
- Create, update, and decompose stories while supporting role-based access to rank and assign them to team members
- Facilitate daily standup meetings
- Create burndown charts
- Calculate team velocity
- View and manage backlog/task status

**Note:** This document assumes that Agile Vision users are familiar with scrum methodology and agile terminology.

## About Agile Vision Third-Party Integrations

You can configure Agile Vision to integrate with the following third-parties:

- CA Clarity. Create and manage requirements in an agile environment while adhering to the traditional project governing process.
- JIRA. Manage user stories and issues from a single location. Track issues in the backlog and report on issues for each user story.
- HP Quality Center (Quality Center). Track product quality directly from each user story.

See the *Agile Vision Integration Guide* for more information.

## Quick Tour

The user interface is arranged in the following manner:

- Header—In addition to the product title, the header also displays the following information:
  - Title of the current page
  - Name of the current user
  - Global actions such as Help, About, Setup, and Logout.

If you are an Agile Vision user, you can click the username link to navigate to the User Detail page. On this page, you can view and edit the user and product notification settings for the products to which you are assigned.

- Menus—Depending on your purchased license, Agile Vision, Administration, and Product Vision menus are available. These menus let you move to different areas so that you can create and manage products and requirements. Pointing your cursor to a menu name displays its contents. When you select a menu item, breadcrumbs appear displaying the menu path.
- Workspace—The workspace is the full-screen area that displays to the right of the menus. Some workspace pages, such as the Backlog page, can display a split pane layout. The Sprint Detail page is tabbed to provide a comprehensive view of the entire sprint on one page.

You can navigate to most pages from multiple points. For example, you can view and edit user story details from the Backlog and Sprint Detail pages. Most Agile Vision pages allow you to set up and manage your products more easily.

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## Agile Vision Menu

You use the Agile Vision menu to access the pages that enable you to manage all aspects of your agile products. You can do the following:

- View and manage the sprint backlog
- Create and manage user stories
- Create, manage, and assign teams to user stories
- Create and manage user story tasks.

The Agile Vision menu groups planning and management tasks into the following sections:

### Overview

The Overview menu contains the following personal and product-tracking pages.

- [Home Page](#) (see page 16)
- [Dashboard](#) (see page 78)

### Planning

Use the selections in the Planning menu to plan and manage your products and sprints. You can view the details of sprints, user stories, and tasks. And you can create and edit user stories and tasks that you are participating in.

The Planning menu contains the following pages:

- [Backlog](#) (see page 19)
- [Sprint Detail](#) (see page 67)
- [Epics](#) (see page 20)
- [Themes](#) (see page 81)

### Resources

Use the Resources menu to work with scrum teams and team members, assign a team to one or more sprints, and define the team sprint velocity. This menu contains the following page:

- [Teams](#) (see page 59)

## Setup

Setup navigates to the Salesforce.com setup screen. Your access rights determine the tasks you can perform. For help using Setup, navigate to the Setup page and then click the Help for this Page link.

## Page Features

The Agile Vision and Product Vision pages have a number of convenient features to help you set up and manage your products more easily.

### View Filters

Some pages have a filter below the header that enables you to control what you view on the page. For example, you can filter the Sprint Detail page to view details by product, sprint, and team. Select a product to constrain the list of sprints to only those sprints associated with the product. Select a sprint to constrain the Team filter choices further to teams assigned to the sprint. The data displayed on the Sprint Detail pages shows only information relating to the chosen team for the chosen sprint.

The filtered view becomes the default view on subsequent visits to the Backlog, Product Dashboard, and Sprint Detail pages until you change the settings.

### Tool Tips and Hover Text

Tool tips display for buttons and links on pages throughout Agile Vision and Product Vision. On pages such as the detail pages, where a product or its related components appears as a link (underlined), hover text displays pertinent information about the component. Users can quickly view information without navigating away from their current page. For example, on the User Story Detail page, the hover text for Sprint displays:

- Sprint name
- Sprint start and end dates
- Goals
- Risks

If users need more information than what is displayed in the hover text, or they need to change properties, they can click View or Edit within the hover text to navigate to the respective pages.

## Navigation Links

Users can navigate to most pages from almost every Agile Vision or Product Vision page. On list pages, action items such as Edit or View appear in an Action column. Clicking Edit navigates to the edit page for the product or component being viewed. Clicking View navigates to its detail page.

Names of products and their components appear as underlined text. Clicking these links navigates to their respective detail pages. Quick info cards that appear as hover text also contain view and edit buttons.

On pages that are not main menu pages, a Back button on the header navigates to the previous page.

## Sort a Table

On pages where data is displayed in table format, users can sort the table on any of the columns.

**Note:** You cannot sort user stories and tasks on the Backlog page. They are ordered by rank only.

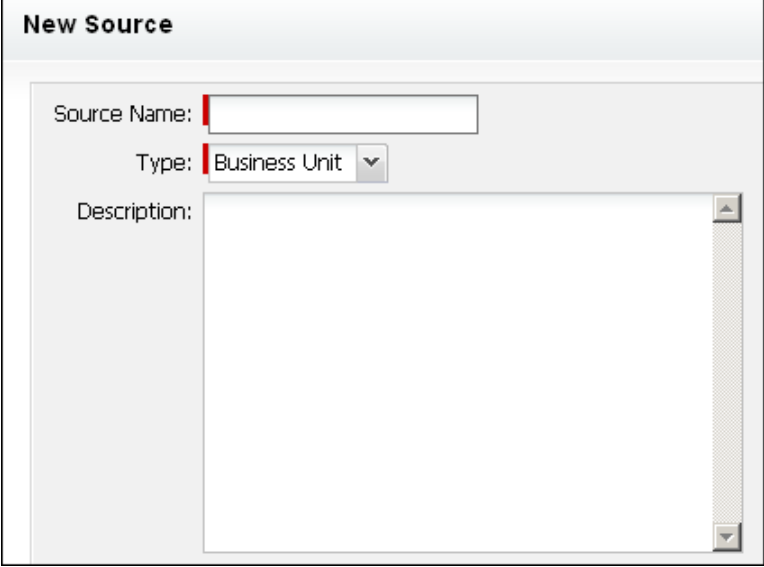
### To sort a table

1. Move the cursor over a list heading.
2. Click the list menu button, and click Sort Ascending or Sort Descending.

The contents of the table re-display in the sort order selected.

## Required Fields

Fields with a red border on the left side are required. The following illustration shows the two fields required for creating a new source: Source Name and Type.



The screenshot shows a form titled "New Source". It contains three fields: "Source Name:" with a text input field, "Type:" with a dropdown menu showing "Business Unit", and "Description:" with a large text area. The left side of the "Source Name:" and "Type:" fields has a red border, indicating they are required.

You cannot save changes on the page unless these fields contain valid data.

## Auto Suggest for Lookups

Auto suggest displays a list of values that matches the characters entered in the text field of a lookup attribute. For example, if you type *Bo* in a lookup text field, the system displays a list of suggested values containing the string *Bo*. Select the appropriate value from the list. Adding additional letters to the string further narrows the suggestions.

## List Display and Pagination on the Backlog page

A large product can have hundreds of user stories. By default, Agile Vision displays 50 user stories at one time on the Backlog page. To move forward and backward through the pages, click the navigation buttons at the top of the work area.

A pagination tool located at the top of the work area displays the user story count on the page and the total number of user stories for the product.

You can set the number of user stories you want to display on each page. If you navigate to another page you must reset it when you return.

**To set the number of stories to display**

1. Click the down arrow on the Show field.
2. Select the number of stories. The minimum number is ten stories. The maximum is 1000.

**Editable List Page Fields**

Many fields on list pages can be edited and saved directly.

Click in a list page field to begin editing. If the field can be edited, it activates so that you can make changes.

When you make changes to a field, a small red triangle appears in the upper left of the field to indicate that changes have been made.

The following editing and selection tools are available for editing list fields:

- Text boxes
- Drop-down lists
- Check boxes

**Create a Backlog Page Filter**

On the Backlog page you can create and save a favorite or frequently used view filter, so that you don't have to reset the product backlog view each time. This becomes your default view on subsequent visits to the page until you change the settings or remove the filter.

To remove the filter, click Remove Filter

**To create a filter**

1. On the Backlog page, click Show Filter.
2. Select and clear the filters as needed.
3. Enter a name for the filter, and click Save.

## Get Started

All users logging in to Agile Vision are directed to their Home page. The Home page contains the following items:

- A figure illustrating the agile process workflow
- A list of open tasks assigned to the user
- Links to the following:
  - *Agile Vision Getting Started Guide*
  - User story create page
  - Virtual Wall (for managing tasks)

### Assigned Tasks List

Each task in the task list displays the product, release, sprint, user story, and team it is a part of, and an hours breakdown. The tasks are sorted alphabetically by sprint end date. If no tasks are created or assigned, the task list is empty.

If you are logging in to Agile Vision for the first time, or you are not yet a member of a team assigned to a product, you won't see any assigned tasks.

By clicking the corresponding links, users can do the following:

- View details of the task, its parent user story, or the sprint that the task is associated with.
- Edit task properties.

### How Do I Start?

To help you quickly get started using Agile Vision, click the link for the *Agile Vision Getting Started Guide*. The *Getting Started Guide* provides an overview of the sequence of tasks involved in creating and managing a product in Agile Vision. The document then guides you through each task

Although sometimes there are several methods for doing the same task (creating a user story, for example), the *Getting Started Guide* describes only one method. To view other methods, see the online help.



# Chapter 2: Product Backlog

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This section contains the following topics:

[About Product Backlog](#) (see page 18)

[How to Build the Product Backlog](#) (see page 19)

[Rank the Product Backlog](#) (see page 19)

[About Epics](#) (see page 20)

[About User Stories](#) (see page 27)

[About Tasks](#) (see page 39)

[About Issues](#) (see page 51)

## About Product Backlog

The Backlog page displays the product backlog as an ordered list of current and upcoming user stories and associated issues for a product. You can view the backlog as a hierarchical view or standard view.

### Hierarchical View

Click Hierarchy View on the Backlog page header area to display the backlog as a hierarchy. The hierarchy view displays the following items for the selected product:

- Epics at the topmost level
- User stories at the next level
- Tasks at the last level

At the highest level, you can view the following information for all epics and user stories:

- ID and title
- Priority
- Points
- Assignee
- Type (epic or user story)

You can do the following from the hierarchical view:

- Click the title link to view epic, user story, or task details.
- Create epics and right-click to create user stories and tasks.
- Expand epics to view associated user stories and their assigned sprint and release.
- Expand user stories to view associated tasks and their status, team, estimated and remaining hours.
- Edit epics, user stories, and tasks.

### Standard View

Click Standard View link on the Backlog page header area to display the backlog as a list of user stories and issues at the same level.

The standard view is the default view when you click Backlog from the Planning menu. The Type column distinguishes an issue from a user story.

You can do the following from the standard view:

- Rank the product backlog by ordering the user stories and issues by their assigned priority.

- Display the sprint backlog panel on the right side of the workspace by clicking << (the show sprint backlog link). The sprint backlog enables you to plan your sprints in a visual manner.
- Expand the user stories and issues to see subtasks.

A pagination tool at the top of the workspace enables you to navigate through multiple pages. This tool is useful when the product contains many stories or issues. You can set the number of user stories to display on a page.

## How to Build the Product Backlog

To build the product backlog do the following:

- [Create epics that contain user stories](#) (see page 20)
- [Create and update user stories](#) (see page 27)
- [View user story details](#) (see page 29)
- [Create tasks](#) (see page 40)
- [Edit task properties](#) (see page 45)
- [Rank the backlog](#) (see page 19)
- [Plan a sprint](#) (see page 67)
- [Create issues for products](#) (see page 51)

## Rank the Product Backlog

The default Backlog page displays the entire sprint backlog for a product. User stories and issues are displayed by title, release, sprint, assignee, and other details. The backlog list is ranked by highest importance to lowest.

You can rank user stories either by editing the order number for the user story in place or by dragging and dropping.

### **To rank the product backlog using drag and drop**

1. Grab a user story or issues (anywhere on the line) with your mouse. The selected line highlights in a different color and a message confirms that you have selected the row.
2. Drag and drop the line on the appropriate rank position.

The new ranking is automatically saved.

## About Epics

Epics are used in agile development as parent placeholders for multiple child user stories that span multiple sprints and releases in a product. The Epics page displays a list of all epics created, and their title, associated product and status.

From the Epic page, you can do the following tasks:

- [Create new Epics](#) (see page 20)
- [View details about an epic](#) (see page 22)
- [Edit epic properties](#) (see page 21)

## Create Epics

You must be a member of a product for which you are creating an epic or an administrator.

You can also create an epic from the Epics list page.

### To create an epic

1. Go to the Agile Vision menu and select Backlog from the Planning menu.
2. Display the backlog for the product for which you want to create an epic.
3. Click Hierarchy View in the header area.  
The backlog appears in the hierarchy view.
4. Click New Epic.  
The New Epic popup appears.
5. Complete the following fields:

#### **Title**

Defines the name of the epic.

#### **Assignee**

Defines the team member who owns the epic.

#### **Points**

Defines the number of points estimated to complete the epic. Point values must be expressed as integers. Decimals are not allowed.

#### **Priority**

Defines the importance of the epic in the product.

**Values:** Very High, High, Medium, Low, Very Low, Not Prioritized

**Status**

Defines the current status of the epic.

**Values:** Planned, In Progress, Completed, Closed

**Team**

Defines the scrum team assigned to complete the epic.

**Theme**

Defines the theme that the epic is a part of.

**Description**

Defines the purpose of the epic and provides other relevant information.

6. Save your changes and close.

The new epic is added to the epics list.

## Edit Epic Properties

You can modify all properties of an epic except the product.

**To edit epic properties**

1. Select Epic from the Planning menu.  
The Epic list page appears.
2. Click Edit next for the epic you want to edit.  
The Epic Edit page appears.
3. Modify the following fields:

**Title**

Defines the name of the epic.

**Status**

Defines the current status of the epic.

**Values:** Planned, In Progress, Completed, Closed

**Assignee**

Defines the team member who owns the epic.

**Team**

Defines the scrum team assigned to complete the epic.

### Points

Defines the number of points estimated to complete the epic. Point values must be expressed as integers. Decimals are not allowed.

4. Save your changes.

## Delete Epics

You can delete an epic if you are a member of the product that it is a part of. You delete an epic on the Epic Detail page. When an epic is deleted, the child user stories are not deleted. Deleting an epic has no effect on burndown charts.

You can delete multiple epics from the Epics list page by holding down the Ctrl key and selecting the epics. The selected epics are shown as highlighted.

## How to Manage Epics

In addition to displaying general information about an epic, the Epic Detail page enables you to view and manage all information related to an epic. You can perform the following tasks from the Epic Detail page:

- [Edit epic properties](#) (see page 21)
- [Delete an epic](#) (see page 22)
- [Add existing child user stories](#) (see page 23)
- [Add new child user stories](#) (see page 24)
- Delete child user stories

## Add Existing Child User Stories to an Epic

You can add multiple user stories to an epic provided they are not already the children of other epics. The user stories can span multiple sprints and releases but must belong to the same product as the epic.

### To add a user story to an epic

1. Select Epics from the Planning menu.  
The Epics list page appears.
2. Click View next for the epic to which you want to add user stories.  
The Epic Detail page appears.
3. In the User Stories section, click Add Child Story.  
The Add Child Story page appears.
4. Complete the following field:

#### **User Story**

Defines the child user story that belongs to this epic.

Should specify that this is an Auto Suggest field. Begin typing the name of the user story or ID to filter the results.

5. Select the user story to add and click Save and Close.

## Create New Child Story from an Epic

When you add a user story from an epic, these user stories are added to the list on the Backlog page.

### To create new child user story from an epic

1. Select Epic from the Planning menu.  
The Epic list page appears.
2. Click View next to the epic for which you want to add user stories.  
The Epic Detail page appears.
3. In the User Stories section, click New Child Story.  
The New Child Story page appears.
4. Complete the following fields:

#### Title

Specifies the name of the user story.

**Required:** Yes

**Limits:** 255 characters

**Example:** Many Agile teams use the format: "As a \_\_\_ I want to \_\_\_ so that \_\_\_". For example, "As a user, I want to see home page when I log in so that I can view my current tasks". Follow your organization's convention.

#### Assignee

Specifies the team member who owns the user story.

**Note:** You can assign the user story to an Agile Vision user who is not a member of the scrum team that owns the story.

**Example:** A member of another team is needed to do code review.

**Default:** The assignee for the epic.

#### Points

Defines the number of points estimated to complete the user story. Point values must be expressed as integers. Decimals are not allowed.



### Priority

Specifies the user story's importance in the product.

#### Values:

- Very High
- High
- Medium
- Low
- Very Low

**Default:** Medium

### Status

Specifies the user story's current status.

#### Values

- Planned
- In Progress
- Completed
- Closed
- **Default:** Planned

### Scrum Team

Specifies the scrum team assigned to complete the user story. The list of available teams is limited to those assigned to the sprint.

**Default:** The scrum team for the epic.

### Theme

Specifies the themes that the user story is part of.

**Default:** The theme for the epic.

### Description

Defines the purpose of the user story and provides additional relevant information.

5. Click Save and Close.

## Copy User Story to Create Epic

You can create an epic from a user story by copying the information from the user story into the epic. The values from the user story become the default values for the epic. You can change all of these values for the epic except the product.

The user story becomes the child of this new epic by default. If the user story is already a child of another epic, then it is dissociated from the other epic and associated to this new epic. You can delete the user story from the epic if desired.

### To copy an user story to an epic

1. Open the user story that you want to copy to an epic from the Backlog page.

The User Story Detail page appears.

2. Click Copy to Epic.

The Edit Epic page appears.

3. Edit the following fields and click Save.

#### **Title**

Defines the name of the epic.

#### **Points**

Defines the number of points estimated to complete the epic. Point values must be expressed as integers. Decimals are not allowed.

#### **Status**

Defines the current status of the epic.

**Values:** Planned, In Progress, Completed, Closed

#### **Priority**

Defines the importance of the epic in the product.

**Values:** Very High, High, Medium, Low, Very Low, Not Prioritized

#### **Assignee**

Defines the team member who owns the epic.

#### **Product**

Displays the product associated with the epic.

#### **Team**

Defines the scrum team assigned to complete the epic.

#### **Theme**

Defines the theme that the epic is a part of.

**Description**

Defines the description for the epic.

## About User Stories

A user story describes a feature or functionality that the team commits to delivering.

### Create or Edit User Stories

You can create a user story from Agile Vision Home page, Backlog page, Sprint Detail page, or Theme Detail page. After you create a user story, the Product field becomes display-only. You cannot associate the user story with a different product. You can edit the other properties of the user story. To edit a user story, on the Backlog page, click Edit next to the story you want to edit.

**To create a user story on the Backlog page**

1. Go to the Agile Vision menu and select Backlog from the Planning menu.
2. Display the backlog for the product for which you want to create the story.
3. Click Add User Story.

The User Story Edit page appears.

4. Complete or edit the following fields as needed.

**Title**

Specifies the name of the user story.

**Required:** Yes

**Limits:** 255 characters

**Example:** Many Agile teams use the format: "As a \_\_\_ I want to \_\_\_ so that \_\_\_". For example, "As a user, I want to see home page when I log in so that I can view my current tasks". Follow your organization's convention.

**Status**

Specifies the user story's current status.

**Values**

- Planned
- In Progress
- Completed
- Closed
- **Default:** Planned

### Priority

Specifies the user story's importance in the product.

#### Values:

- Very High
- High
- Medium
- Low
- Very Low

**Default:** Medium

### Story Points

Defines the number of points estimated to complete the user story. Point values must be expressed as integers. Decimals are not allowed.

### Assignee

Specifies the team member who owns the user story.

**Note:** You can assign the user story to an Agile Vision user who is not a member of the scrum team that owns the story.

**Example:** A member of another team is needed to do code review.

### Epic

Defines this user story as the child of an existing epic. You can move a user story from one epic to another from the edit page of the user story.

### Description

Defines the purpose of the user story and provides additional relevant information.

5. In the Product Details section, complete or edit the following fields as needed:

#### Product

Specifies the unique name of the product.

#### Release

Specifies the release to associate the user story with.

#### Sprint

Specifies the sprint in which the user story is completed.

#### Theme

Specifies the themes that the user story is part of. The user story is listed on detail pages of all the selected themes.

**Team**

Specifies the scrum team assigned to complete the user story. The list of available teams is limited to those assigned to the sprint.

**Default:** None

6. Click Save.

The User Story Detail page appears. From this page you can view and manage all information relating to the story, and create tasks as sub-items of it.

## How to Manage User Stories

In addition to displaying general information about a user story, the User Story Detail page enables you to view and manage all information related to a user story such as tasks, dependencies, comments, issues, and test cases. You can perform the following tasks from the User Story Detail page:

- Edit user story properties
- [Add attachments](#) (see page 32)
- [Define acceptance criteria](#) (see page 29)
- [Create a dependency on another user story](#) (see page 31)
- [Add comments](#) (see page 33)
- [Clone the user story](#) (see page 39)
- [Copy the user story to an epic](#) (see page 26)
- [Link to and view issues](#) (see page 35)
- [Link to and view Quality Center test cases](#) (see page 34)

## Define Acceptance Criteria

On the User Story Detail page you can define the acceptance criteria that will be used to determine whether the user story is completed. Acceptance criteria defines the requirements for a user story to be considered acceptable by the stakeholders and the client.

**To define acceptance criteria**

1. Display the User Story Detail page for the user story you want to create acceptance criteria for.
2. In the Acceptance Criteria section, click New Acceptance Criteria.

The Acceptance Criteria page appears.

3. Complete the following fields:

**Title**

Specifies a unique name for the acceptance criterion.

**Limits:** 80 characters

**Status**

Specifies the criterion's status.

**Values:**

- New (default)
- Passed
- Failed
- Deferred

**Description**

Defines the acceptance criterion.

**Limits:** 2000 characters

4. Do one of the following:
  - Click Save to save your criteria and return to the User Story Detail page.
  - Click Save and Create New to save your criteria and create more.

## View Acceptance Criteria Details

In addition to displaying general information about an acceptance criteria, the Acceptance Criteria Detail page enables you to edit or delete the acceptance criteria.

## Create a User Story Dependency

Sometimes a user story requires the delivery of another user story's feature or functionality before it can be implemented. For example, a user story that enables users to access online help depends on completion of the user story to create a Help button on the user interface. You can create dependencies in the user story detail to note these requirements. The dependency must be a user story in the same product.

When you create a user story dependency, the story detail for the user story upon which the dependency rests also updates the section Dependencies on this user story. Team members can view the dependency details, the date the feature must be delivered, the team, assignee, and the current status of the user story. Clicking the dependent user story title opens the User Story Detail page for the dependent user story.

### To create a dependency on a user story

1. On the User Story Detail page, click New Story Dependency  
The Story Dependency Edit page appears.
2. Complete the following fields:

#### **Deliverable**

Defines the feature or functionality that is required by the current user story.

**Required:** Yes

**Limits:** 255 characters

#### **User Story For Deliverable**

Specifies the title of the user story on which this user story depends. Enter a few characters of the user story title to display a list of suggestions.

#### **Description**

Defines the reason for the dependency, and other pertinent information about the dependency.

#### **Due Date**

Specifies the date when the dependent feature or functionality must be delivered. If the dependent user story is assigned to a sprint, then due date must be the first day of that sprint.

**Required:** Yes

**Limits:** 255 characters

### **Dependent User Story**

Specifies the title of the dependent user story. This field is automatically populated with the title of the current user story and cannot be changed.

3. Click Save.

The story detail updates to reflect the dependency details.

## **Add a Note or Attachment to a User Story**

You can attach relevant documents, such as planning documents, notes or graphics, to a user story so that team members can view them.

### **To upload a document to a user story**

1. On the Backlog page, click the title of the user story you want to work with.  
The User Story Detail page appears.
2. In the Notes and Attachments section, click Attach File.  
The Attach File page appears.
3. Browse and select the path or URL to the file location and click Attach File.  
A message appears when the file has been uploaded.
4. Click Done.

### **To add a note to a user story**

1. On the Backlog page, click the title of the user story you want to work with.  
The User Story Detail page appears.
2. In the Notes and Attachments section, click New Note.  
The Note Edit page appears.
3. Enter the subject of the note in the Title field.
4. Enter the note text in the Body field.
5. Click Save.



## Add Comments to a User Story

If you are a product team member, you can add comments to a user story so that team members can view them.

You can also add comments to issues from the issue detail page. The procedure is similar to the one described below.

### To add a comment to a user story

1. On the Backlog page, click the title of the user story you want to work with.

The User Story Detail page appears.

2. In the Comments section, click New Comment.

The User Story Comment Edit page appears.

3. Review or complete the following fields:

#### **Story ID**

Displays the unique ID for the user story.

#### **Title**

Displays the title for the user story.

#### **Comment**

Defines the comment for the user story.

4. Click Save.

The User Story Comment Detail page appears displaying the details of the comment you added.

## Link to Quality Center Test Cases

If Agile Vision is configured to integrate with Quality Center, you can associate a user story to existing Quality Center test cases. The product associated with the user story must be mapped to a Quality Center project.

See the *Administration Guide* for more information.

If you delete a test case from the User Story Detail page, the test case is not deleted in Agile Vision or Quality Center. Only the link between the user story and the test case is removed.

### To link a user story to an existing test case

1. On the Backlog page, click the title of the user story you want to work with.

The User Story Detail page appears.

2. Scroll to the Test Cases section and click Link to Test case.

The Test Cases pop-up appears.

3. Select a Quality Center folder to display the test cases in that folder.

4. Select one or more test cases and click Save and Close.

The selected test cases are listed in the Test Cases section on the user story details.

5. Review the following for the linked test cases:

#### **Owner**

Displays the test case owner as defined in the Quality Center project.

#### **Title**

Displays the test case title as defined in the Quality Center project.

#### **Status**

Displays the latest test case status from Quality Center (passed, failed, or not run).

#### **Additional Comments**

Displays any comments on the test case as defined in the Quality Center project. If the test case fails, the failed steps are displayed here.

#### **Test Case Pass rate**

Displays the test run results from Quality Center.

6. Click the View link for a test case to review additional details such as test case steps and description.

## Link to Issues

You can link a user story to an existing issue in the product. The issue can be a generic issue created in Agile Vision or an integrated issue imported from JIRA.

### To link the user story to an existing issue

1. On the Backlog page, click the title of the user story you want to work with.  
The User Story Detail page appears.
2. Scroll to the Issues section and click Link to Issue.  
The Link to Issue pop-up appears.
3. In the Issue field, enter a few characters of the issue ID or title to search and select an existing issue.
4. Click Save and Close.  
The selected issues are listed in the Issues section on the user story details.
5. Review the following details for the linked issues:
  - Issue ID and title
  - Status
  - Assignee
  - Severity
  - Priority
6. Click the View link for an issue to review additional details and do one or more of the following:
  - Edit the issue
  - Delete the issue
  - Create sub tasks for the issue
  - Comment on the issue
  - Add notes and attach files

## View Comment Details

The Comment Detail page displays details for a user story comment or an issue comment, including:

- The actual comment and the associated user story or issue.
- The time and date the comment was added.

- The team member that created the comment and last modified it.

If you created the comment or if you are an administration user, you can edit or delete the comment from this page. The Comment By, Created By, and Last Modified By fields are links that navigate you to the user detail pages.

## Assign a Team Member to a User Story

A team member who is assigned to a user story becomes its owner. Team members are assigned to user stories on the User Story Detail page. After a user story is assigned to a team member, tasks created on the Backlog page for that user story are automatically assigned to the same team member, but can be assigned to other team members.

### To assign a team member to a user story on the Backlog page

1. Go to the Agile Vision menu and select Backlog in the Planning menu.
2. Click Edit for the user story you want to assign.  
The User Story Edit page appears.
3. In the Assignee field, enter the name of the team member who will own the user story, or enter 2 or more characters of the first or last name and select the member from the auto-suggest list.
4. Click Save.

### To assign a team member to a user story on the Sprint Detail page

1. Click the Agile Vision menu and select Sprint Detail in the Planning menu.
2. Filter the view to display the sprint for the user story you want to assign.
3. Click Edit for the user story you want to assign.  
The User Story Edit page appears.
4. In the Assignee field, enter the name of the team member who will own the user story, or enter two or more characters of the first or last name and select the member from the auto-suggest list.
5. Click Save.

## Delete a User Story

You can delete a user story if you are a member of the product that it is a part of. You delete a user story on the User Story Detail page. When a user story is deleted, the following user story details are also deleted:

- Dependencies required by the user story
- Acceptance criteria

- Tasks that are part of the user story.

Deleting a user story has the following effects on burndown charts:

- Any hours reported for tasks belonging to the deleted user story are deleted.
- The burndown chart guidelines are adjusted to reflect the hours or points removed by the deletion. The adjustment is effective from the day the user story was deleted.
- The actual burndown line shows any points or hours for the deleted user story and its tasks as burned down.

## Close a User Story

A user story can be moved to the Completed status when all of its associated tasks are completed. Any team members associated with an active team on the product can move a user story to Completed status. Typically, the product owner or scrum master closes the user story after reviewing it and approving that it meets the acceptance criteria.

### To close a user story

1. Go to the Agile Vision menu and select Backlog from the Planning menu.
2. Filter the view to display the user story you want to close.
3. Click Edit for the user story you want to close.  
The User Story Edit page appears.
4. In the Status field select Closed, and click Save.

## Manage User Stories Integrated with CA Clarity

The following describes how you can manage user stories and tasks that are integrated with CA Clarity:

- To assign user stories to a release, verify if time is logged on tasks for the user stories. If time is logged for the tasks, do the following:
  - Verify that the users that logged time are resources on the CA Clarity project associated with the release.
  - If the users are not on the CA Clarity project team, add the users to the project and run the Agile Vision Project Sync job.
- To assign users to user stories and tasks, verify that the users are resources on the linked CA Clarity project team.
- To remove assignees from a task, verify that there are no worklogs on the task.

See the Agile Vision *Integration Guide* for more information.

## Clone User Stories along with Tasks

You can clone a user story along with its associated tasks to create a new user story.

The following rules apply when you clone a user story:

- If the original user story belongs to an epic, the new user story is created as a child of the same epic. You can change this association after cloning.
- All values are cloned from the original user story except the status and title.
- The status of the new user story is set to Planned by default.
- The title of the new user story displays the title of the original user story appended with "Clone".
- If a task is cloned, all values from the original task are cloned except the status which is set to Planned by default.
- Worklogs associated with a task are not cloned.

### To clone a user story

1. On the Backlog page, click the title of the user story you want to work with.  
The User Story Detail page appears.
2. Click Clone.  
The Select tasks to clone page appears All tasks are selected by default for cloning.
3. Unselect any tasks that you do not want to clone and click Save and Continue.  
The User Story Edit page appears.
4. Edit the values that you want to change and click Save.

## About Tasks

Generally, a user story is broken down into one or more tasks. Tasks are items of work that one or more team members perform during a sprint.

Tasks display on the Backlog page and in User Stories & Charts on the Sprint Detail page underneath their parent user story. Tasks are also displayed as cards on the Virtual Wall on the Sprint Detail page. Clicking a task title displays its details.

When you change the status of a task to Completed or Closed from the task popup, task details, or Virtual Wall, the remaining hours become zero on the task.

## Create Tasks

### To create a task on the Backlog page

1. In the product backlog section of the Backlog page, expand the user story for which you want to create a task.
2. Click New Task.  
The Create/Edit Task pop-up appears.
3. Complete the following fields, and click Save.

#### Task Title

Defines the name of the task.

**Required:** Yes

#### Status

Specifies the current state of the task.

#### Values:

- Planned
- In Progress
- Completed
- Closed

**Default:** Planned

#### Assignee

Specifies the team member responsible for completing the task.

**Default:** The assignee for the user story, if specified.

#### Team

Defines the team assigned to the task.

**Default:** The team assigned to the user story, if specified.

#### Estimated Hours

Defines the number of hours estimated to complete the task. This includes any hours already logged.



**Type**

Defines the type of task.

**Values:**

- Implementation
- QA
- Doc
- Design
- Other

**Default:** None

**To create a new task in User Stories & Charts**

1. Display the details for the sprint that the user story is a part of, and go to User Stories & Charts.
2. Expand the user story for which you want to create a task and click New Task.  
The New Task pop-up appears.
3. Follow step 3 from the Backlog page procedure.

**To create a task from the User Story Detail page**

1. With the User Story Detail page open, click New Task.  
The Task Edit page appears.
2. Complete the following fields:

**Title**

Defines the name of the task.

**Required:** Yes

**Status**

Specifies the current state of the task.

**Values:**

- Planned
- In Progress
- Completed
- Closed

**Default:** Planned

**Description**

Defines the purpose of the task and provides additional relevant information.

### **Assignee**

Specifies the team member responsible for completing the task.

**Default:** The assignee for the user story, if specified.

### **Type**

Defines the task type.

#### **Values:**

- Implementation
- QA
- Doc
- Design
- Other

**Default:** None

### **Estimated Hours**

Defines the number of hours estimated to complete the task. This includes hours already logged for the task.

### **Hours Worked**

Displays all the hours logged for the task.

### **Team**

Specifies the scrum team assigned to complete the task.

**Default:** The scrum team assigned to the user story, if specified.

3. Do one of the following:
  - To create the task, click Save.  
The Task Detail page appears. From this page you can edit task properties or delete the task.
  - To create the task and continue creating new tasks, click Save and New.  
The task is created and the fields on the Task Edit page clear.

### **To create a task on the Virtual Wall**

1. Click the Agile Vision menu and select Sprint Detail from the Planning menu.
2. Display the details for the sprint that the user story is a part of, and go to Virtual Wall.
3. Click New Task for the user story to which you want to add a task.  
A new task card is added to the user story.

4. Click the name of the task on the task card.  
The Task Detail page appears.
5. Click Edit and complete the following fields:

**Title**

Defines the name of the task.

**Required:** Yes

**Status**

Specifies the current state of the task.

**Values:**

- Planned
- In Progress
- Completed
- Closed

**Default:** Planned

**Description**

Defines the purpose of the task and provides additional relevant information.

**Assignee**

Specifies the team member responsible for completing the task.

**Type**

Defines the task type.

**Values:**

- Implementation
- QA
- Doc
- Design
- Other

**Estimated Hours**

Defines the number of hours estimated to complete the task. This includes any hours already logged.

**Hours Worked**

Displays the number of hours already logged for the task.

### Team

Defines the task type.

#### Values:

- Implementation
- QA
- Doc
- Design
- Other

### To create a task in place on the Virtual Wall

This procedure enables you to quickly add a task without leaving the Virtual Wall.

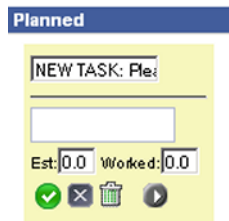
1. Click the Navigation menu and select Sprint Detail from the Planning menu.
2. Display the details for the sprint that the user story is a part of, and go to Virtual Wall.

3. Click New Task for the user story to which to want to add a task.

A new task card is added to the user story.

4. Double-click the task card below the name.

The task card redisplay with editable fields.



5. Complete the fields:
  - a. Clear the top field and enter a task title.
  - b. Enter the name of the team member who will be assigned to the task in the second field.
  - c. Enter the number of hours estimated to complete the task.
  - d. If the task is already started, enter the number of hours worked. You can only do this if you are a product team member. The hours worked are added to the Task Worklog with work date and username details.
  - e. If the task is already started, click the right arrow button to change the task status from Planned to In Progress.
6. Click the check button to save your settings.

## Edit Task Properties

### To edit task properties on the Backlog page

1. On the Backlog page, expand the parent user story and click Edit for the task you want to edit.
2. Complete the following fields:

#### Title

Defines the name of the task.

**Required:** Yes

#### Status

Specifies the current state of the task.

##### Values:

- Planned
- In Progress
- Completed
- Closed

**Default:** Planned

#### Assignee

Specifies the team member assigned to the task.

#### Team

Specifies the scrum team assigned to complete the task.

#### Estimated Hours

Defines the number of hours estimated to complete the task including hours already logged for the task.

#### Type

Defines the task type.

##### Values:

- Implementation
- QA
- Doc
- Design
- Other

**Default:** None

3. Click Save.

The task properties are updated and you are returned to the Backlog page.

#### **To edit task properties from User Stories & Charts**

1. In User Stories & Charts on the Sprint Detail page, expand the parent user story and click Edit for the task you want to edit.
2. Complete the following fields, and click Save.

##### **Task Title**

Defines the name of the task.

**Required:** Yes

##### **Status**

Specifies the current state of the task.

###### **Values:**

- Planned
- In Progress
- Completed
- Closed

**Default:** Planned

##### **Assignee**

Specifies the team member responsible for completing the task.

##### **Team**

Specifies the scrum team assigned to complete the task.

##### **Estimated Hours**

Defines the number of hours estimated to complete the task. This includes hours already logged for the task.

#### **To edit task properties from the User Story Detail page**

1. With the User Story Detail page open, click Edit next to the task you want to edit.  
The Task Edit page appears.
2. Modify the following fields:

##### **Title**

Defines the name of the task.

**Required:** Yes

**Status**

Specifies the current state of the task.

**Values:**

- Planned
- In Progress
- Completed
- Closed

**Default:** Planned

**Description**

Defines the purpose of the task and provides additional relevant information.

**Assignee**

Specifies the team member responsible for completing the task.

**Default:** The assignee for the user story, if specified.

**Type**

Defines the task type.

**Values:**

- Implementation
- QA
- Doc
- Design
- Other

**Estimated Hours**

Defines the number of hours estimated to complete the task. This includes hours already logged for the task.

**Hours Worked**

Displays the number of hours already logged for the task.

**Team**

Specifies the scrum team assigned to complete the task.

**Default:** The scrum team assigned to the user story, if specified.

3. Click Save.

## How to Manage Tasks

The Task Detail page displays information about a task, including:

- Its current status
- The team member it is assigned to
- Estimated hours to complete
- Actual hours worked
- Remaining hours (calculated)
- The user story it is associated with

In addition to viewing the details of the task and its related components you can do the following:

- Click the user story title, assignee name, and scrum team name links to navigate to their respective detail pages.
- [Edit task properties](#) (see page 45)
- [Delete the task](#) (see page 48)
- [Create task worklogs](#) (see page 49)

## Delete a Task

You can delete a task on the User Story Detail page, or by accessing the Task Detail page from the Backlog page. When a task is deleted, the following changes take place:

- The task is removed from the Backlog page and from the User Stories & Charts and Virtual Wall on the Sprint Detail page.
- Any hours reported on the task are removed
- The guideline on the hours burndown chart updates to reflect the new total estimated hours for tasks
- The actual burndown line burns down any remaining hours on the deleted task



## Create Task Worklogs

Use the Task Worklog section on the Task Detail page to log the daily hours worked on a task. You can log the hours worked on a task several times in a day. All the logged hours are aggregated and reflected as a single entry for the task for the user for that day. An ID is automatically generated for the entry.

All the hours worked on a task that are logged on the Virtual Wall are also merged into an existing entry (if there is one) on the task worklog. New entries are not created for hours logged multiple times for the same day.

The worklog is available only to product team members and administration users.

Based on the total hours logged daily for task worklogs, the following are updated:

- Remaining hours left on the task.
- Remaining hours left for the current sprint and applicable date changes on the burndown charts.
- Timesheets in CA Clarity if the Agile Vision release is linked with a CA Clarity project.

### To create a task worklog

1. On the Task Detail page, click New Task Worklog

The Worklog Edit page appears.

2. Complete the following fields:

#### Work Date

Defines the date for which you are creating the task worklog. The available dates are based on the sprint dates of the parent user story. If the user story is not assigned to a sprint, select a date from the last two weeks as all scrum teams generally include two-week sprints.

#### Assignee

Defines the assignee associated with the task.

#### Hours Worked

Defines the number the hours logged for this task worklog. Remaining hours on the task is recalculated based on the hours worked.

#### Task

Displays the task associated with the task worklog.

3. Click Save.

The Task Worklog Detail page appears.

## Manage Worklogs for Tasks Integrated with CA Clarity

The following describes how you can manage worklogs for tasks that integrate with CA Clarity:

- To log time on tasks from the task detail or the Virtual Wall, verify that you are a member of the product to which the task belongs.
- To log time on tasks from the task detail for other users, verify the following:
  - You are an administration user.
  - The user for which you are logging time is a resource in the CA Clarity project team.
- To delete your worklog from a task, do the following:
  - If the associated timesheet in CA Clarity is currently open, delete the worklog in Agile Vision. The Timesheet Sync job automatically updates the CA Clarity timesheet.
  - If the associated timesheet in CA Clarity is already submitted, delete the worklog in Agile Vision and create a timesheet adjustment in CA Clarity.  
  
See the *CA Clarity Basics User Guide* for more information.
- To allow resources to log time on integrated tasks in Agile Vision, add the resources as team member on the CA Clarity project.

**Note:** If you log time in Agile Vision, wait for the Timesheet Sync job to run before submitting the timesheet in CA Clarity. The job updates the timesheet with the latest logged hours and tasks from Agile Vision. To schedule this job to run more often at the end of week, contact your CA Clarity administrator.

## Orphaned Worklogs

If you delete a resource from a project in CA Clarity before worklogs are posted for that resource, the worklogs become orphaned. A resource does not exist against which the corresponding worklogs can be posted.

In this situation, the project manager is notified through automated email to take one of the following actions:

- Delete the worklog in Agile Vision.
- Add the resource back to the CA Clarity project team so time can be logged.

## Edit or Delete Task Worklogs

You can edit or delete a task worklog provided the following conditions are true:

- You are an administrator or the record owner of the worklog.
- If the user story is assigned to a sprint, the workdate is within the release dates.

## View Task Worklog Details

The Task Worklog Detail page displays worklog information for a task, including:

- Hours worked on the task
- The task worklog assignee details
- The task worklog date
- The team member that created the worklog and last modified it.

In addition to viewing the details of the task worklog, you can do the following:

- [Edit a Task Worklog](#) (see page 50)
- [Delete a Task Worklog](#) (see page 50)

You can click the Created By and Last Modified By links to navigate to the user detail pages.

## About Issues

You can create issues in Agile Vision and link to them from user stories.

If Agile Vision is configured to integrate with JIRA then you can create issues in JIRA and manage them in Agile Vision. The issues synchronize between JIRA and Agile Vision.

See the *Agile Vision Integration Guide* for more information.

Points assigned to issues and time logged on tasks associated with issues affect the burndown charts.

## Create Issues

### To create an issue

1. From the Backlog page, display the Agile Vision product for which you want to create an issue.
2. Click New Issue.  
The New Issue pop-up appears.
3. Complete the following fields:

#### **Title**

Defines the issue title.

**Points**

Defines the number of points estimated to resolve the issue. Point values must be expressed as integers. Decimals are not allowed.

**Status**

Defines the status of the issue.

**Priority**

Specifies the importance of the issue in relation to the product.

**Severity**

Specifies the severity of the issue in relation to the product.

**Assignee**

Defines the assignee for the issue. The assignee must be a project team member.

**Description**

Defines the description for the issue.

**Steps to Reproduce**

Defines the steps to reproduce the issue in Agile Vision.

**Expected Result**

Defines the result expected by the user after performing the given steps to reproduce the issue.

**Actual Result**

Defines the result the user actually sees after performing the given steps to reproduce the issue.

**Workaround**

Defines the workaround for this issue.

**Affected Release**

Defines the release affected by this issue. The available releases are based on the product associated with the issue.

**Fix Release**

Defines the release in which this issue will be fixed. The available releases are based on the product associated with the issue.

**Sprint**

Defines the sprint in which this issue will be fixed. The available sprints are based on the selected fix release.

**Scrum Team**

Defines the team assigned to the issue. The available scrum teams are based on the project associated with the issue.

**Theme**

Defines the themes associated with the issue. If the issue is linked to an user story, then the theme is the same as the one assigned to the user story.

4. Click Save and Close.

## Edit Issues

You can edit all attributes of an issue except the product associated with the issue. You can delete an issue even if it is synchronized with JIRA. Deleting the issue in Agile Vision also deletes it from JIRA.

**To edit an issue**

1. From the Backlog page, click Edit for the JIRA issue you want to edit.  
The Issue Edit page appears.
2. Edit the following fields:

**Title**

Defines the issue title.

**Points**

Defines the number of points estimated to resolve the issue. Point values must be expressed as integers. Decimals are not allowed.

**Status**

Defines the status of the issue.

**Priority**

Specifies the importance of the issue in relation to the product.

**Severity**

Specifies the severity of the issue in relation to the product.

**Assignee**

Defines the assignee for the issue. The assignee must be a project team member.

**Description**

Defines the description for the issue.

**Steps to Reproduce**

Defines the steps to reproduce the issue in Agile Vision.

**Expected Result**

Defines the result expected by the user after performing the given steps to reproduce the issue.

**Actual Result**

Defines the result the user actually sees after performing the given steps to reproduce the issue.

**Workaround**

Defines the workaround for this issue.

**Affected Release**

Defines the release affected by this issue. The available releases are based on the product associated with the issue.

**Fix Release**

Defines the release in which this issue will be fixed. The available releases are based on the product associated with the issue.

**Sprint**

Defines the sprint in which this issue will be fixed. The available sprints are based on the selected fix release.

**Scrum Team**

Defines the team assigned to the issue. The available scrum teams are based on the project associated with the issue.

**Theme**

Defines the themes associated with the issue. If the issue is linked to an user story, then the theme is the same as the one assigned to the user story.

3. Click Save.

## Create Tasks for Issues

### To create a task for an issue

1. Open the issue from the Backlog page.  
The Issue Detail page appears.
2. Scroll to the Tasks section and click New Tasks.  
The Task Edit page appears.  
Complete the following fields:

#### Title

Defines the name of the task.

**Required:** Yes

#### Status

Specifies the current state of the task.

#### Values:

- Planned
- In Progress
- Completed
- Closed

**Default:** Planned

#### Assignee

Specifies the team member responsible for completing the task.

**Default:** The assignee for the issue, if specified.

#### Team

Defines the team assigned to the task.

**Default:** The team assigned to the issue, if specified.

#### Estimated Hours

Defines the number of hours estimated to complete the task including any hours already logged.

#### Hours Worked

Displays the number of hours logged on the task.

### **Type**

Defines the type of task.

#### **Values:**

- Implementation
- QA
- Doc
- Design
- Other

**Default:** None

## **Add Comments to Issues**

### **To add comments to an issue**

1. Open the issue from the Backlog page.  
The Issue Detail page appears.
2. Scroll to the Comments section and click New Comment.  
The Issue Comment Edit page appears.
3. Enter your comments on the issue and click Save.  
The comment detail page appears.

## **Add Notes and Attachments to Issues**

### **To add notes to an issue**

1. Open the issue from the Backlog page.  
The Issue Detail page appears.
2. Scroll to the Notes & Attachments section and click New Note.  
The Note Edit page appears.
3. Complete the following fields and click Save:

#### **Private**

Indicates if the note is private or not. A private note means that only the user adding the that note can view it.

#### **Title**

Defines the title of the note.



**Body**

Defines the main message for the note.



# Chapter 3: Teams

---

This section contains the following topics:

[About Teams](#) (see page 59)

[Create a Scrum Team](#) (see page 59)

[Add a Scrum Team Member](#) (see page 61)

[Edit Team Properties](#) (see page 63)

[Delete a Scrum Team](#) (see page 64)

[View Scrum Team Details](#) (see page 64)

[Assign a Team to a Sprint](#) (see page 65)

[Remove a Scrum Team Member](#) (see page 66)

## About Teams

You can manage your team resources on the Teams page. You can filter the page to view teams by projects or for all projects.

From the Teams page you can do the following tasks:

- [Create a new scrum team](#) (see page 59)
- [View details about a scrum team](#) (see page 64)
- [Edit scrum team properties](#) (see page 63)

## Create a Scrum Team

A scrum team can be assigned to one or more sprints. One or more scrum teams can be assigned to one product.

### To create a new scrum team

1. Go to the Agile Vision menu and select Teams from the Resources menu.  
The Teams page appears.
2. Click New Team.  
The New Scrum Team page appears.

3. Complete the following fields:

**Scrum Team Name**

Specifies the name of the scrum team.

**Required:** Yes

**Limits:** 80 characters

**Active**

Specifies whether the team is active. Inactive teams are not presented as options in the filters through Agile Vision.

**Default:** Active

**Expected Velocity**

Defines the estimated total story points that a scrum team believes they can realistically complete during a sprint. The velocity displays as team capacity in the sprint backlog.

This value becomes the default velocity for the team for each new sprint that they are assigned to. You can modify this value as needed by editing the sprint team on the Sprint Detail page.

**Story Point Scale**

Defines the story point scale your team uses. Enter a comma-separated list of numbers.

**Default:** Fibonacci sequence 1 through 21

**Product**

Specifies the unique name of the product.

**Required:** Yes

**Scrum Meeting Time/Location**

Specifies the time and location for daily scrum meetings.

**Hours per Day**

Defines the base or standard number of hours per day that all team members spend actively working for the team. This value is used in the burndown calculations.

**Scrum Team Domain**

Specifies the Domain name or URL for the team.

4. Click Save.

The Sprint Assignment page appears.

5. Do one of the following actions:

- To assign the team to sprints, select the check box next to each sprint you want to assign the team to, and click Add Team to Sprints.
- Click Skip This Step to assign the team to sprints later. Note that by clicking Skip This Step, the team will not participate in the listed sprints. The team can be added to a sprint in the Sprint Information tab of the Sprint Detail page.

**Note:** After a scrum team is created, it is automatically added to any new sprints created for the product that the team is assigned to.

The Scrum Team Detail page appears. From this page you can edit team information and add members to the team.

## Add a Scrum Team Member

A user must be an active Agile Vision user to participate as a team member. This step is important to ensure that the right users are participating on the product.

**Important!** In order to participate on a product (create and edit user stories, tasks, and so on), a user must be a member of at least one scrum team assigned to that product.

**To add a new scrum team member**

1. With the Scrum Team Detail page open, navigate to the Scrum Team Members section and click New Scrum Team Member.

The Scrum Team Member Edit page appears.

2. Edit the following fields.

**Member Name**

Specifies the user you want to add to the scrum team. The user names in the list are Salesforce.com users that have already been added as Agile Vision users.

**Role**

Specifies the member's role on the team.

**Values:**

- Member
- Scrum Master
- Product Owner

**Team Member Notes**

Specifies additional relevant information about the team member.

**Limits:** 255 characters

**Scrum Team**

Specifies the name of the scrum team to which the member is being added.

**Default:** The current scrum team

**Required:** Yes

**Active**

Specifies whether the team member is an active part of the team.

**Default:** Active

**Allocation (%)**

Specifies the percentage of time the member will be allocated to this team or product. If no value is specified, the team member is not considered in the team allocation charts.

**Default:** 0%

3. Do one of the following:
  - To add the user to the team, click Save.  
The team member is added and you return to the Scrum Team Detail page.
  - To add the user to the team and choose another user to add to the team, click Save and New.  
The Scrum Team Member Edit page appears.

## Edit Team Properties

After creating a scrum team you can modify any of its properties.

### To edit a scrum team's properties

1. Go to the Agile Vision menu and select Teams from the Resources menu.  
The Teams page appears.
2. Click View for the scrum team you want to edit.  
The Team Detail page appears.
3. Click Edit.  
The Team Edit page appears.
4. Modify the following fields, and click Save.

#### Scrum Team Name

Specifies the name of the scrum team.

**Required:** Yes

**Limits:** 80 characters

#### Active

Specifies whether the team is active. Inactive teams are not presented as options in the filters through Agile Vision.

**Default:** Active

#### Expected Velocity

Defines the estimated total story points that a scrum team believes they can realistically complete during a sprint. The velocity displays as team capacity in the sprint backlog.

This value becomes the default velocity for the team for each new sprint that they are assigned to. You can modify this value as needed by editing the sprint team on the Sprint Detail page.

#### Story Point Scale

Defines the story point scale your team uses. Enter a comma-separated list of numbers.

**Default:** Fibonacci sequence 1 through 21

#### Product

Specifies the unique name of the product.

**Required:** Yes

### Scrum Meeting Time/Location

Specifies the time and location for daily scrum meetings.

### Hours per Day

Defines the base or standard number of hours per day that all team members spend actively working for the team. This value is used in the burndown calculations.

### Scrum Team Domain

Specifies the Domain name or URL for the team.

## Delete a Scrum Team

An Agile Vision user who has super user privileges can delete a scrum team. When a scrum team is deleted, the following changes take place:

- Team members are removed from the team
- Any open user stories assigned to members of the team become unassigned
- The team is no longer available to assign to items in the product
- The team cannot be selected in the filter for velocity and burndown charts
- Any team member whose only assignment was on the deleted team can no longer participate on the product (the product becomes view only)

Work completed by team members prior to deleting the team can still be viewed in charts when All Teams is selected. You can still view detail pages for completed user stories and tasks.

## View Scrum Team Details

The Scrum Team Detail page displays information about the team, including the team members. Team members can start participating on a product from the Scrum Team Detail page. You can do the following tasks from this page:

- [Edit team properties](#) (see page 63)
- [Add, edit, and delete scrum team members](#) (see page 61)
- [Map Virtual Wall colors](#) (see page 74)



## Assign a Team to a Sprint

If a scrum team was not assigned to any sprints at the time it was created, or if you want to add the team to additional sprints, you can do this on the Sprint Detail page.

**Note:** This procedure assigns an existing scrum team. It does not create a new one.

### To assign a sprint team to a sprint

1. Go to the Agile Vision menu and select Sprint Detail from the Planning menu.
2. Go to Sprint Information, and filter the view to display the sprint you want to assign the team to.
3. In the Sprint Team section, click New Sprint Team.  
The Sprint Team Edit page appears.
4. Complete the following fields and click Save.

#### Scrum Team

The name of the scrum team you want to assign.

#### Expected Velocity

Defines the estimated total story points that a scrum team believes they can realistically complete during a sprint. The velocity displays as team capacity in the sprint backlog.

Expected velocity does not alter general team numbers. You can accept the value specified on the scrum team properties page or override it for the sprint by entering a new value. The new value becomes the default velocity for the team for each new sprint that the team is assigned to.

#### Sprint Backlog

Specifies the name of the sprint. A tool tip displays the sprint name, its start and end dates, goals and risks.

#### Hours per Day

Defines the base or standard number of hours per day that all team members spend actively working for the team. This value is used in the burndown calculations.

This value does not alter general team numbers. You can accept the Hours per Day specified in the scrum team properties page or override it for the sprint by entering a new value.

## Remove a Scrum Team Member

An Agile Vision user who is a member of the same product can remove a team member from a scrum team on the Scrum Team Detail page. After a team member is removed, the following changes happen:

- The team member does not display in any lists that are filtered by the scrum team the member was removed from.
- For any burndown charts based on assignee, the guidelines and actual burndown calculations are adjusted to reflect the removal of the team member. Team burndown calculations are unaffected.
- Any user stories or tasks that were assigned to the team member become unassigned. This does not affect user stories and tasks that are already closed.
- The team member cannot edit or manage user stories and tasks that are assigned to the scrum team from which they were removed.

# Chapter 4: Sprints

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This section contains the following topics:

[About Sprint Planning](#) (see page 67)

[Manage a Sprint](#) (see page 71)

## About Sprint Planning

Teams use the sprint backlog section of the Backlog page to plan their upcoming sprints. Click the Show Sprints link (left-facing black arrow) to open the sprint backlog panel. Click the right-facing black arrow link (Hide Sprints) to close the panel. You can filter the sprint backlog by release, sprint, and team.

Your filter settings become the default view on subsequent visits to the page and persist until you change them. The available releases are those associated with the current product in the product backlog.

The sprint backlog is divided into three sections:

- Stories displays the user stories committed to for a sprint. Expand each user story to display the tasks necessary to complete them. By default, the sprint backlog lists user stories by their story points (highest to lowest).
- Velocity displays a team velocity bar chart. Capacity is the maximum number of story points the team can commit to for the sprint, and appears as a green bar. Capacity is taken from the Velocity value in the scrum team properties. The Planned bar represents the number of story points the team actually commits to delivering for the sprint. As user stories are added and removed from the sprint, this bar automatically updates. If planned story points exceed the team capacity, the Planned bar changes to red. The team can use the velocity chart to see if they are reaching their capacity.

**Note:** The Velocity chart only displays when you filter the Sprint Backlog by team.

- Team Allocation displays available sprint hours and the number of hours currently assigned for each team member. A time allocation bar chart provides a quick way to assess a team member workload.

The time allocation bar for the team member displays in blue when the member is under-allocated (below 80 percent capacity). As more hours are assigned to the team member and their assigned hours are within 80 percent of capacity, the bar changes to green to indicate that time is properly allocated. If assigned hours exceed the team member availability, the bar turns red.

When planning the workload for an upcoming sprint, a scrum team generally does the following tasks:

- View sprint details
- Edit sprint properties
- [Rank the product backlog](#) (see page 19)
- [Add user stories to the sprint](#) (see page 68)
- [Create user story tasks](#) (see page 40)
- [Define or refine user story acceptance criteria](#) (see page 29)
- [Create user story dependencies](#) (see page 31)
- [Assign team members to unassigned user stories](#) (see page 36)

## Move a User Story from the Backlog to the Current Sprint

The Backlog page simplifies sprint planning by enabling you to drag and drop user stories from the product backlog into a sprint.

### To move a user story from the product backlog to the current sprint

1. In the Backlog page, display the backlog for the product you want to work with.
2. Click the Show Sprints link (left-facing black arrow) to display the sprint backlog, and filter the view to display the backlog for the sprint you want to work with.
3. Select the release, sprint, and team you are planning for. You must select a release and sprint. You can view all teams participating on the sprint, or one team. If you select a team, you can view the velocity chart for the team. If you view all teams, the velocity chart does not display.
4. Click and drag a user story from the product backlog and drop it onto the sprint backlog.

The user story is added to the sprint backlog, the team velocity chart is updated, and the sprint is updated in the product backlog and user story detail.

**Note:** A user story with no story points is not calculated in the sprint capacity.

## Remove a User Story from a Sprint

You can remove a user story from a current or upcoming sprint and return it to the product backlog so that it can be assigned to another sprint.

### To remove a user story from the current sprint

1. Go to the Agile Vision menu and select Backlog from the Planning menu.  
The Backlog page opens.
2. Select the product you want to work on in the Filter tool.
3. Display the sprint backlog panel and select the sprint that contains the user story you want to remove.
4. Click the Remove icon next to the user story you want to remove.

The story is removed from the current sprint. This is reflected in the page by the following actions:

- The user story disappears from the sprint backlog
- The sprint information disappears from the user story in the product backlog

## Change Team Sprint Velocity

A team's estimated velocity can change from one sprint to the next. When planning the workload for a sprint, you can update the team's velocity on the Sprint Detail page. The changes are immediately reflected in the sprint backlog section of the Backlog page.

### To update a team's velocity

1. In the Agile Vision menu, click Sprint Detail and go to Sprint Information.
2. Filter the view by product and the sprint in which you want the change to occur.
3. Click Edit for the sprint team you want to update.

The Sprint Team Edit page appears.

4. Update the following fields as needed, and click Save.

### Expected Velocity

Defines the estimated total story points that a scrum team believes they can realistically complete during a sprint. The velocity displays as team capacity in the sprint backlog.

Expected velocity does not alter general team numbers. You can accept the value specified on the scrum team properties page or override it for the sprint by entering a new value. The new value becomes the default velocity for the team for each new sprint that the team is assigned to.

### Hours per Day

Defines the base or standard number of hours per day that all team members spend actively working for the team. This value is used in the burndown calculations.

This value does not alter general team numbers. You can accept the Hours per Day specified in the scrum team properties page or override it for the sprint by entering a new value.

## Manage a Sprint

The daily standup meeting serves to keep the team up-to-date with what each member is working on and any issues that might impact the completion of tasks. User stories and tasks can be reevaluated and re-scoped.

During the sprint, the team uses the Sprint Detail pages to manage the status of their assigned tasks and user stories. Task status is updated on the Virtual Wall. User stories are updated in User Stories & Charts. Managers and team members track the sprint and team progress through burndown and allocation charts in User Stories & Charts.

At the end of a sprint, the team usually demonstrates the features that they committed to delivering at its start. Afterwards, the team typically conducts a retrospective to discuss issues that arose during the sprint and ideas for improvement. The retrospective comments are added to Sprint Information.

## Manage Sprint Details

Use the Sprint Detail page to view and manage all aspects of the sprint as follows:

- [View and edit sprint Information](#) (see page 71)
- [Manage user stories and view charts](#) (see page 71)
- [Work on the Virtual Wall](#) (see page 72)

## Sprint Information

Sprint Information on the Sprint Detail page displays all information relating to a sprint including general information, goals and risks, sprint metrics, retrospective comments, user stories and teams assigned to it. You can filter the view by product, sprint, and team. The filtered view becomes your default view on subsequent visits to the page.

From Sprint Information, you can perform the following tasks:

- Edit sprint properties
- Delete the sprint
- [View sprint team details](#) (see page 64)
- [Edit sprint team properties](#) (see page 63)

## User Stories & Charts

User Stories & Charts is the default view when you navigate to the Sprint Detail page. This page provides a comprehensive view into a sprint, including all the sprint user stories. You can expand user stories to see their associated tasks. Clicking a task title displays its task details.

In addition to user stories and tasks, you can view the following charts:

- Sprint burndown
- Points burndown
- Team member allocation

From User Stories & Charts, you can perform the following tasks:

- [View charts](#) (see page 77)
- [View details of a user story](#) (see page 29)
- Edit user story properties
- [Create new tasks for a user story](#) (see page 40)
- [Edit task properties](#) (see page 45)
- [Manage user stories integrated to CA Clarity](#) (see page 38)

## Virtual Wall

When planning and managing a sprint, team members generally manipulate cards representing user stories and tasks. The cards are tacked to a wall or large board and manually moved around to update status and details. The Virtual Wall enables you to manage your tasks graphically. Team members can view all user stories and tasks committed for the sprint.

The tasks are arranged by user story and by their status. Each task appears as a card displaying the task name, the individual assigned to work on the task, and the hours remaining on the task.

The location of the card from left to right on the page tells the viewer the task status, which can be one of the following:

- Planned
- In Progress
- Completed

The default card color is green, but each team can color-code their task cards by mapping them on the Team Detail page.



Team members can manage tasks on the Virtual Wall in the following ways:

- [Setting Virtual Wall colors](#) (see page 74)
- [Editing task details](#) (see page 74)
- [Creating new tasks](#) (see page 40)
- [Updating task status](#) (see page 73)

## Update Task Status on the Virtual Wall

The Virtual Wall enables you to drag and drop tasks to update their status.

Dragging a task to a new status changes only the status. Edit the task to update the hours completed on it to reflect the burndown accurately. However, when you drag a task to a Completed status, any remaining hours on the task are zeroed out automatically.

### To update task status

Do one of the following:

- Drag the task card and drop it in the appropriate status column (for example, from In Progress to Completed).
- Double-click the task card and use the buttons at the bottom of the form to move the card to the appropriate status.
- Click the title of the task at the top of the task card and edit the Status field on the Task Edit page.

The task status updates immediately and the burndown calculations and team allocation are updated.

## Set Virtual Wall Colors

When tasks display on the Virtual Wall they are green. You can color-code the task cards on the Virtual Wall to display in different colors for each task state, task type, or assignee for the task. You can only map colors for one set of criteria. Color mapping is team-specific and is set on the Team Edit page.

### To set task colors for the Virtual Wall

1. Go to the Agile Vision menu and select Teams from the Resources menu.
2. Click Edit for the team you want to work on.  
The Team Edit page appears.
3. In the Virtual Wall Colors section, select a color criterion: Status, Type, or Assignee.  
The values and current color sample for your selection appear. For example, for Status, a color sample appears for each task state (Planned, In Progress, Completed, Closed).
4. Choose new colors for your values and click Save.

**Note:** To see your new color settings on the Virtual Wall, be sure to set the Team filter to display the team you set the colors for.

## Edit a Task on the Virtual Wall

You can edit task details on the Virtual Wall as a team member on the product. The Virtual Wall is a convenient way to update task details while you are managing its status.

If you are not a team member on the product, you can only view the Virtual Wall.

### To edit a task in place on the Virtual Wall

1. Double-click in the body of the task card you want to edit.  
The task card redisplay with fields that you can edit.
2. Complete the fields:
  - a. Clear the top field and enter a new task title.
  - b. Enter the name of the team member assigned to the task in the second field.
  - c. Enter the number of hours estimated to complete the task.
  - d. Enter the number of hours worked.
  - e. Click the left or right arrow buttons to move the task to a new status.
3. Click the check button to save your changes.

**To edit a task on the Virtual Wall**

1. Click the title of task card you want to edit.  
The Task Details page appears.
2. Click Edit.  
The Task Edit page appears.
3. Modify the following fields, and click Save.

**Title**

Defines the name of the task.

**Required:** Yes

**Status**

Specifies the current state of the task.

**Values:**

- Planned
- In Progress
- Completed
- Closed

**Default:** Planned

**Description**

Defines the purpose of the task and provides additional relevant information.

**Assignee**

Specifies the team member responsible for completing the task.

**Type**

Defines the task type.

**Values:**

- Implementation
- QA
- Doc
- Design
- Other

**Estimated Hours**

Defines the number of hours estimated to complete the task.

### Hours Worked

Defines the number of hours worked for the task.

### Team

Specifies the scrum team assigned to complete the task.

## Change User Story Status

As a user story progresses from planning to completion, you can update the status on the User Story Edit page.

### To change user story status

1. Go to the Agile Vision menu and select Sprint Detail from the Planning menu.
2. Filter the view to display the sprint that contains the user story you want to work on.
3. Click Edit for the user story you want to update.
4. In the Status field, select the new status and click Save.

## View User Story Dependencies

You can view dependencies—those required by a user story and those that are dependent on it. On the User Story Detail page, the dependency name is a link that navigates to the Story Dependency Detail page. This page displays the dependency title, the user story whose deliverable is required, the due date, the dependent user story, and a description of the dependency.

From the Story Dependency Detail page you can do the following:

- Edit the dependency
- View details of the user story whose deliverable is needed

## Track Daily Progress on Sprint Tasks

Team members, product owners, and management can monitor sprint tasks and track team member progress by doing the following:

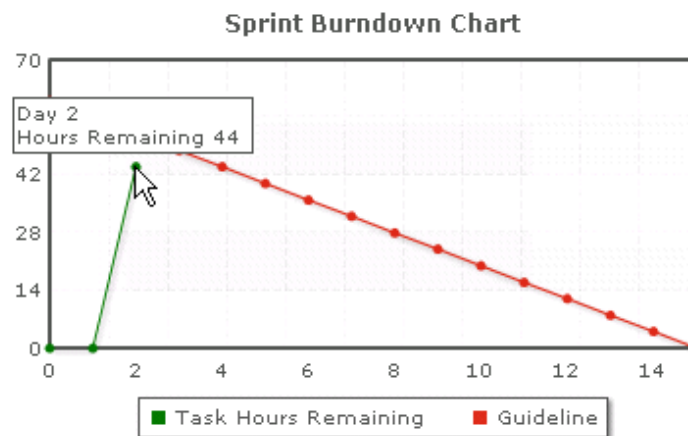
- Viewing and updating comments and notes on the Sprint Detail and User Story Detail pages
- Viewing sprint progress charts and reports on the Dashboard page and in User Stories & Charts on the Sprint Detail page
- Discussing task status in daily stand-ups
- Leveraging the Virtual Wall to update task progress

## View Charts on the Sprint Detail Page

User Stories and Charts on the Sprint Detail page displays several charts to provide a comprehensive report of sprint progress. You can filter the view by product, sprint, and team.

### Hours Burndown

An hours burndown chart compares the actual hours the team(s) burned on user stories against the expected burndown for the sprint.



The x axis shows the days in the sprint. All days, including weekends, are considered valid workdays. The y axis shows the task hours in the sprint. Actual hours remaining displays as a green line. The expected burndown, or guideline, displays in red. Each point on the lines is a data point representing a day in the sprint. Hover text on remaining hours data points displays the sprint day and the remaining effort. Hover text on the guideline data points displays the sprint day and the remaining planned effort.

### Points Burndown

A points burndown chart compares the remaining story points the team(s) completed against the expected burndown. Like the sprint burndown, the actual burndown line is green and the guideline is red.

Each data point on the actual burndown line represents a day in the sprint. The daily point burndown reflects the points remaining for that day and any new point estimation (for example, user stories added, removed or changes in user story points). A tool tip on the actual burndown line displays the sprint day and the number of points remaining in the sprint.

## Team Member Allocation

A team member allocation chart. For each team member, the chart displays their total capacity for the sprint, remaining hours to date, and a time allocation bar chart.

The bar chart compares team member capacity against actual assigned hours. The bar displays green for properly allocated time (80 to 100% of capacity), blue if under-allocated, and red if over-allocated. Hover text on a bar displays remaining available hours, remaining assigned hours, and % of time (%actual, \$total).

## View Charts on the Dashboard Page

The Dashboard page contains four configurable charts. Each chart can be filtered individually to create a specific chart for a product, enabling users to create a customized view. For example, a user, can create the following charts:

- An hours burndown chart for Release 1 of Product A for one team
- A points burndown chart for Sprint 2 of Product B for all teams
- A velocity chart for one team for Product C
- An hours burndown chart for Product C for one team

Users can select the following chart types:

### Hours Burndown

An hours burndown chart that compares actual hours the team(s) burned on user stories against the expected burndown for the sprint.

The x axis shows the days in the sprint. All days, including weekends, are considered valid workdays. The y axis shows the task hours in the sprint. Actual hours remaining displays as a green line. The expected burndown, or guideline, displays in red. Each point on the lines is a data point representing a day in the sprint. Hover text on remaining hours data points displays the sprint day and the remaining effort. Hover text on the guideline data points displays the sprint day and the remaining planned effort.

### Points Burndown

A points burndown chart that compares the remaining story points the team(s) completed against the expected burndown. Like the sprint burndown, the actual burndown line is green and the guideline is red.

Each data point on the actual burndown line represents a day in the sprint. The daily point burndown reflects the points remaining for that day and any new point estimation (for example, user stories added, removed or changes in user story points). A tool tip on the actual burndown line displays the sprint day and the number of points remaining in the sprint.

## Velocity

A velocity chart showing the team's story point capacity for the sprint, and the number of points actually planned. The x axis represents all the sprints in the release. The y axis represents the user story points delivered for each sprint. Vertical bars represent the team's velocity for the sprint. The average velocity of current and previous closed sprints combined appears as a turquoise line running horizontally across the velocity bars.

## Display Charts on the Dashboard Page

Team members and other users can quickly create charts to view the current status of products.

### To display charts

1. Go to the Agile Vision menu and select Dashboard from the Overview menu.
2. Click the filter icon in the right-hand corner of a chart window.  
The Chart Options filter appears.
3. Select the product you want to view. This value is required.
4. Select the release you want to view. This value is required.
5. To view sprint or team progress, select a sprint and team.
6. Select the type of chart you want to view (hours, points, or velocity), and click Apply  
The requested chart displays. Your selections persist until they are changed.

## Close a Sprint

As the sprint moves to a close team members do the following:

- [Update task status](#) (see page 73)
- [Close tasks](#) (see page 73)
- [Close user stories](#) (see page 37)
- [Move incomplete user stories to the next sprint](#) (see page 69)
- [Conduct a retrospective to identify issues to work on in the next sprint](#) (see page 80)

## Add a Sprint Retrospective

At the end of a sprint the scrum team generally conducts a retrospective meeting to discuss their successes and failures, and identify steps they can take to improve the process and avoid making the same mistakes. The comments and decisions made during the retrospective can be captured in the Retrospective section of the Sprint Information tab on the Sprint Detail page.

The Sprint Retrospective field has a 32,000 character limit.



# Chapter 5: Themes

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This section contains the following topics:

- [About Themes](#) (see page 81)
- [Create a Theme](#) (see page 81)
- [Edit Theme Properties](#) (see page 82)
- [View Theme Details](#) (see page 83)

## About Themes

Themes are sometimes used in agile development to group related user stories together. The Themes page displays a list of all themes created, and their descriptions.

From the Themes page you can do the following tasks:

- [Create new themes](#) (see page 81)
- [View details about a theme](#) (see page 83)
- [Edit theme properties](#) (see page 82)

## Create a Theme

Themes are optional for products and can be created by any team member assigned to the product. Themes are containers for grouping similar user stories together. You can select multiple themes for a user story available for the selected product. If a user story is assigned to multiple themes, you can see the user story listed in each theme detail.

### To create a theme

1. Go to the Agile Vision menu and select Themes from the Planning menu.  
The Themes page appears.
2. Click New Theme.  
The Theme Edit page appears.
3. Complete the following fields.

#### Theme Name

Defines the name of the new theme.

**Required:** Yes

**Limits:** 80 characters

### **Product**

Specifies the name of the product that the theme is a part of. A user can select only products on which they are a team member.

**Required:** Yes

### **Description**

Specifies information about the theme.

**Limits:** 500 characters

4. Do one of the following:
  - To create the theme, click Save.  
The Theme Detail page appears. From this page you can edit general theme settings and associate user stories with the theme.
  - To create the theme and then create additional themes, click Save and New.  
The theme is created, and the fields on the Theme Edit page clear.

## Edit Theme Properties

### **To edit theme properties**

1. Go to the Agile Vision menu and select Themes from the Planning menu.
2. Click Edit for the theme you want to modify.
3. Modify the following fields, and click Save.

### **Theme Name**

Defines the name of the new theme.

**Required:** Yes

**Limits:** 80 characters

### **Product**

Specifies the name of the product that the theme is a member of.

**Required:** Yes

### **Description**

Specifies information about the theme.

**Limits:** 500 characters

## View Theme Details

The Theme Detail page displays all information relating to the theme, including its general properties, the user stories that are a part of it, and a history of actions taken on it.

You can do the following tasks from the Theme Detail page:

- [Edit theme properties](#) (see page 82)
- Delete the theme
- [Create a new user story that will be part of the theme](#) (see page 27)
- View details of user stories assigned to the theme



# Appendix A: Third-Party Acknowledgements

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This section contains the following topics:

[Dojo Toolkit 1.3.1](#) (see page 85)

[Ext JS - JavaScript Library](#) (see page 86)

[JSON 1.0](#) (see page 87)

[jQuery 1.3.2](#) (see page 88)

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